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L9: Entry 1 of 1

File: USPT

Jun 15, 1993

US-PAT-NO: 5220500

DOCUMENT-IDENTIFIER: US 5220500 A

** See image for Certificate of Correction **

TITLE: Financial management system

DATE-ISSUED: June 15, 1993

INVENTOR-INFORMATION:

NAME CITY STATE ZIP CODE COUNTRY

Baird; Andrew V. Malden MA
Boyer; William E. Boston MA
Pithavadian; Shakunthala S. Cambridge MA

ASSIGNEE-INFORMATION:

NAME CITY STATE ZIP CODE COUNTRY TYPE CODE

Batterymarch Investment System Boston MA 02

APPL-NO: 07/ 409650 [PALM]
DATE FILED: September 19, 1989

INT-CL: [05] G06F 15/20, G06F 15/38

US-CL-ISSUED: 364/408; 364/419

US-CL-CURRENT: <u>705/36</u>

FIELD-OF-SEARCH: 364/408, 364/406, 364/401, 364/419

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

Search Selected Search ALL

PAT-NO ISSUE-DATE PATENTEE-NAME US-CL

4903201 February 1990 Wagner 364/408

4989141 January 1991 Lyons et al. 364/408

OTHER PUBLICATIONS

Hypercard User's Guide, Apple Computer, Inc., 1988, pp. 15-17. Aho et al. (Chapters 4 and 5 of Compilers: Principles, Techniques, and Tools, Addison-Wesley, Reading, Mass. 1986).

ART-UNIT: 231

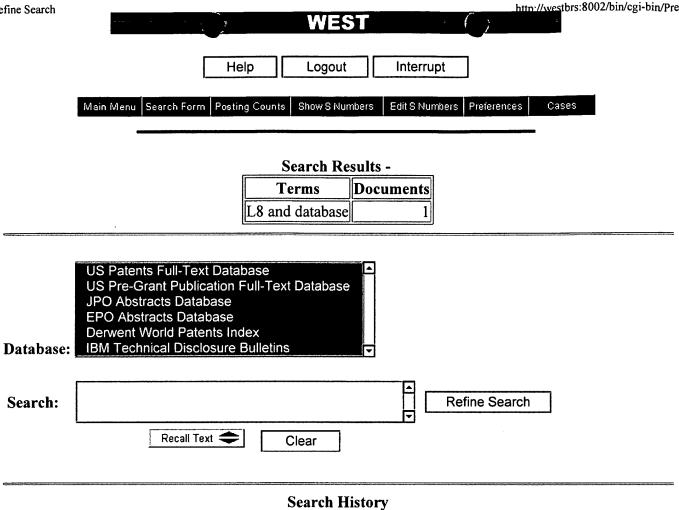
PRIMARY-EXAMINER: Envall, Jr.; Roy N. ASSISTANT-EXAMINER: Poinvil; Frantzy

ATTY-AGENT-FIRM: Fish & Richardson

ABSTRACT:

Record Display Form
A method for enabling a user to interactively create and method for enabling a user to interactively create and method for enabling a user to interactively create and method for enabling a user to interactively create and method for an end of possible investment entities. A graphical representation of a sequence of statements which describe data manipulations corresponding to the investment strategy is provided; the result of the sequence of statements, when applied to the data, is a selection of a subset of entities from the set of possible entities. The user is enabled to interactively enter and manipulate the statements and the sequence of statements via the graphical interface to alter the investment strategy. The user may "run" the strategy via the graphical interface, using the data to derive the subset of entities.

16 Claims, 46 Drawing figures



DATE: Monday, June 09, 2003 Printable Copy Create Case

| Set Name side by side | Query | Hit Count | Set Name result set |
|-----------------------|--|-----------|------------------------|
| DB = USPT, P | GPB,JPAB,EPAB,DWPI,TDBD; PLUR=YES; OP=OR | | |
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| <u>L8</u> | 5220500.pn. | 2 | <u>L8</u> |
| <u>L7</u> | L5 and segments | 16 | <u>L7</u> |
| <u>L6</u> | L5 and database | 25 | <u>L6</u> |
| <u>L5</u> | L4 and symbols | 36 | <u>L5</u> |
| <u>L4</u> | reuters and stock near2 exchange | 76 | <u>L4</u> |
| <u>L3</u> | (((705/37)!.CCLS.)) | 1220 | <u>L3</u> |
| <u>L2</u> | (((705/36)!.CCLS.)) | 835 | <u>L2</u> |
| <u>L1</u> | ((705/35)!.CCLS.) | 890 | <u>L1</u> |

END OF SEARCH HISTORY